ProCon Contractor Portal User Guide for Contracts

Summary

ProCon Version

This guide applies to ProCon 2014 FP1

Audience

This document is intended for Users of the ProCon Contractor Portal

Version

Version	Date	Author	Description
1	22 Dec 2014	Supply Chain Excellence	Document creation
2	22 April 2015	Supply Chain Excellence	Updates

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Definitions

Amendment	*A change to terms and conditions, wording in Contract (no financial or schedule change/impact)*
Company	*Santos Ltd*
Obligations	*Mechanism to track and monitor certain meetings or deliverables against the contract terms. Obligations can also be linked to a specific Contract Milestone.*
Risk Cover	*Mechanism for Contract Administrators to manage risk covers by continually monitoring the expiry dates for insurance certificates, bank guarantees and similar*
Variation Order	*Process is initiated in ProCon™ by the Company and is the confirmation of agreed changes in scope of works with cost and schedule impacts*

Acronyms

AMD	*Amendment*
VO	*Variation Order*

Key Icons

Change Password	Edit	Make my Home Page	Reference Library
Confidential Document	Export	Mandatory Field/Alert	Search
Contract Timeline	Home Page	Notifications	Settings
Create	Logout	Outstanding Contract Tasks	User Details

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Document Conventions

The following conventions are used in this document.

Formatting	Description
Bold	Name of option, check box, menu, field, etc.
Italic	Name of menu option Emphasis Application messages, error messages, etc. Other reference documents
`Fixed Font`	Command prompt input Code sample
Italic Dark Blue	File or folder name Registry key
Italic Blue	Hyperlink to another section in this document
	Note
	Warning
	Tip
	Security Issue

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1 Getting Started With the ProCon Contractor Portal

1.1 Getting Support

To contact ProCon Support

1. Click the **Support** link.

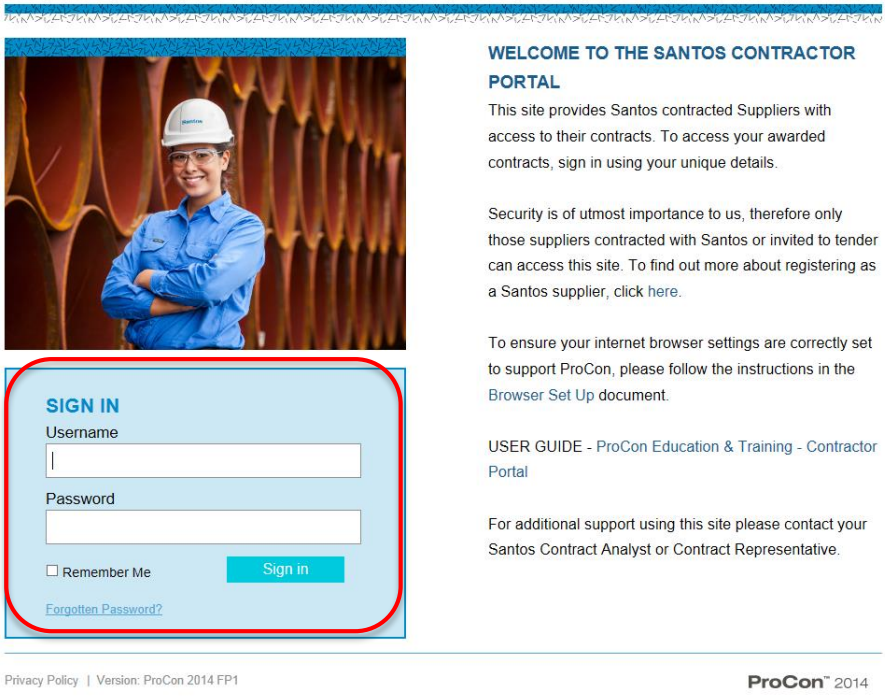
The Support page is displayed listing ProCon support contact information.

1.2 Logging In

To log onto to the Contractor Portal, you must have received a successful registration confirmation via email from Santos Ltd.

1.2.1 To log in

1. Enter your username in the **User Name** field.
2. Enter your password in the **Password** field.
3. Click **Login**.


WELCOME TO THE SANTOS CONTRACTOR PORTAL
This site provides Santos contracted Suppliers with access to their contracts. To access your awarded contracts, sign in using your unique details.
Security is of utmost importance to us, therefore only those suppliers contracted with Santos or invited to tender can access this site. To find out more about registering as a Santos supplier, click here.
To ensure your internet browser settings are correctly set to support ProCon, please follow the instructions in the Browser Set Up document.
USER GUIDE - ProCon Education & Training - Contractor Portal
For additional support using this site please contact your Santos Contract Analyst or Contract Representative.
SIGN IN
Username
Password
Remember Me
Sign in
Forgotten Password?
Privacy Policy | Version: ProCon 2014 FP1
ProCon 2014

The ProCon homepage is displayed.

Note: Your ProCon password is case-sensitive.

Warning: Your ProCon account will be disabled after three unsuccessful login attempts.

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1.2.2 Forgotten Username or Password

To log in if you have forgotten your username or password:

1. Enter whichever value you remember in the **Username** or **Password** field.
2. Click the Forgot Username? or Forgot Password? link as required.

Note: If you have forgotten both your username and password, leave both fields blank and click either link.

The Forgot Your Username/Forgot Your Password page is displayed.

3. Enter your email address in the **Email** field.
4. Click **Submit**.

A confirmation message is displayed. Your username/password will be sent to you via email. If you have forgotten both your username and password, both are sent via email.

Tip: Select the Remember my Password check box. ProCon will remember your password the next time you log in.

1.2.3 Internet Explorer AutoComplete Passwords Feature

If you choose to allow Internet Explorer to remember your password, Internet Explorer automatically populates the **Password** field.

Note: If your password has been changed then you must delete the existing password populated automatically and enter the new one.

1.2.4 To disable the AutoComplete Passwords feature in Internet Explorer:

1. On the Internet Explorer toolbar, click **Tools**, then select *Internet Options* from the drop-down menu.

The Internet Options window is displayed.

2. Click the Content tab.
3. In the AutoComplete section, click **Settings**.
4. Ensure the **Ask me before saving passwords** check box is unchecked then click **OK** when prompted.

1.2.5 ProCon Remember Me feature

If you check **Remember My Password** before you click the **Login** button, a cookie is created in your Temporary Internet Files containing an encrypted version of your ProCon username and password. When you access the ProCon website subsequently you will be logged directly into ProCon without being prompted for your username and password. To reverse this change you must delete the cookie that was added to your Temporary Internet Files. The cookie will be named ProCon.

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1.3 Common Login Errors

1.3.1 Incorrect User Name or Password

If you enter an incorrect password you will receive the following error:

Sorry but the user name and password provided are invalid. Please try again.

If you have forgotten your username or password click the **Forgot Username?** or **Forgot Password?** link on the login page. ProCon will email your forgotten credentials to the email address registered with ProCon.

1.3.2 Account Disabled

If your account has been disabled the following error message is displayed:

Sorry, you have been denied access. Please contact your ProCon administrator.

Your account can be disabled through the following:

- A user attempting to log in with an incorrect password more than three time. This is a security feature to prevent a dictionary attack from gaining access to your account. Please contact your Santos Contract Analyst to regain access.
- If your account has been manually disabled by the ProCon Administrator. Please contact your Santos Contract Analyst to regain access.

1.3.3 Contractor Portal User Interface

The main ProCon user interface has the following main areas:

- Header Bar
- User Menu
- Main Menu
- Work Area
- Footer (including navigation breadcrumbs)

1.4 Setting Your Homepage

ProCon allows you to choose which page you want to use as your homepage. After your next login, ProCon automatically opens at the selected homepage.

You can return to the homepage at any time by clicking The icon in the main menu. You can set the following pages as your ProCon homepage:

- Overview page
- Contract homepage
- Prequalifications Summary page

To choose your homepage:

1. Navigate to the page you want to set as your homepage.
2. Click the icon in the page footer.
3. Warning message is displayed.

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4. Click **OK**.

A confirmation message is displayed.

1.5 Changing Your Password

ProCon passwords expire after 30 days. ProCon prompts you to change your password if it is due to expire.

To change your password:

1. Log onto ProCon. (See ***Logging In*** for more information.)
2. If you password is due to expire the Change Password page is displayed. Your user name is displayed in the **Username** field.
3. Enter your current password in the **Current password** field.
4. Enter your new password in the **New password** field.

Note: Passwords must contain between eight and fifty characters. These characters must include at least one uppercase character, one lowercase character and one digit.

As a defence against hackers and phishing attacks, your first, last or user name cannot be part of your password.

In addition, your last ten passwords cannot be reused.

1. Re-enter your new password in the **Confirm new password** field.
2. Click **Save**.
3. The ProCon homepage is displayed.

1.6 Setting the System Language

ProCon allows you to set your default system language. The languages available are dependent on the languages supported by the latest version of ProCon.

To set the language on ProCon:

1. On the ProCon Login page, click **Set Language**.

   The Set User Language window is displayed.
2. Select your preferred language from the **Preferred Language** drop-down list.
3. Select the preferred language format from the **Preferred Format** drop-down list.
4. Click **Save**.

1.7 Logging Out

To log out of ProCon:

1. Click the icon in the top-right of the page to open the User menu.
2. Click **Log Off**.

   A warning message is displayed.

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3. Click **OK**.

The ProCon Login page is displayed.

1.8 Editing User Preferences

You can change your document control and preference settings in ProCon.

To edit your user preferences:

1. Click the ☰ icon in the top-right of the page to open the User menu.
2. Click **Change User Preferences**.

The User Preferences page is displayed.

3. Edit the information as required in the relevant fields.

Field	Description
Applet Control	• Select *Applet* if you want ProCon to support file compression and multi-file upload functionality. • Select *Manual* if file compression and multi-file upload functionality is not required.
Allow ActiveX Control Support	Select *Yes* to use the ProCon ActiveX control, so you can, for example, edit files online, and drag and drop or copy and paste files directly into ProCon
Preferred Page Size	The maximum number of items to be displayed per page (where applicable, e.g. in tables).
Preferred Language	Your preferred language.
Preferred Format	Your preferred language format (for dates, numbers, etc.).

4. Click **Save**.

A confirmation message is displayed.

2 Overview

The Overview page is your default homepage. This page provides you with notifications and quick access links to any outstanding items that requires your attention.

From this page you can access any outstanding contract tasks by clicking the link in the ***Contract Tasks*** section of the page. See ***Contracts*** for more information.

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3 Company

The Company menu allows you to view your company details on the Contractor database. For changes to your Company details please email your Santos Contract Analyst.

3.1 Company Details

3.1.1 Viewing Company General Details

To view general details of your company:

1. Click the icon in the top-right of the page to open the User menu.
2. Click **Company Details.**

The Company Details page is displayed

3.2 Contacts

Contractor Contacts are managed via Santos. If you need to add/edit/delete a Contact please email your Santos Contract Analyst.

3.2.1 Viewing Contact Details

To view contact details:

1. Click the icon in the top-right of the page to open the User menu.
2. Click **Contact Details**.

The Contact Details page is displayed.

3.3 Documents

3.3.1 Adding Documents

To add a document:

1. Click the icon in the top-right of the page to open the User menu.
2. Click **Documents**.

The Documents page is displayed.

3. Click **Add.**

The Add Document page is displayed.

4. Click **Browse** to locate the document you want to add.
5. Change the name of the document in the **Name field** if required.

Note: Fields marked with an asterisk are mandatory.

6. Click **Save**.

A warning message is displayed.

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7. Click **OK**.

The document is uploaded and a confirmation message is displayed.

3.3.2 Downloading Documents

To download a document:

1. Click the ☰ icon in the top-right of the page to open the User menu.
2. Click **Documents**.

The Documents page is displayed.

3. Click the document you want to download.

The File Details page is displayed.

4. From the ⚙ **Actions** menu, click **Download**.
5. A message is displayed asking you to open or save the document:
   - Click **Open** to open the file in a new browser window.
   - Click **Save** to save a copy to your computer.

Note: If you experience problems downloading files please refer to the troubleshooting section of this online help. See *Troubleshooting* for more information.

3.3.3 Renaming Documents

To rename a document:

1. Click the ☰ icon in the top-right of the page to open the User menu.
2. Click **Documents**.

The Documents page is displayed.

3. Click the document you want to rename.

The File Details page is displayed.

4. From the ⚙ Actions menu, click **Rename.**

The Rename File page is displayed.

5. Enter the new filename in the **New Name** field.
6. Click **Save**.

A confirmation message is displayed.

Note: If you experience problems downloading files please refer to the troubleshooting section of this online help. See Troubleshooting for more information.

3.3.4 Replacing Documents

To replace a document:

1. Click the ☰ icon in the top-right of the page to open the User menu.

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2. Click **Documents**.

The Documents page is displayed.

3. Click the document you want to replace.

The File Details page is displayed.

4. From the Actions menu, click **Replace**.

The Replace File page is displayed.

5. Click **Browse** and select the **replacement document**.
6. Click **Save.**

A warning message is displayed.

7. Click **OK.**

The new document replaces the original on the Documents page and a confirmation message is displayed.

3.3.5 Deleting Documents

To delete a document:

1. Click the icon in the top-right of the page to open the User menu.
2. Click **Documents.**

The Documents page is displayed.

3. Click the document you want to delete.

The File Details page is displayed.

4. From the Actions menu, click **Delete**.

A warning message is displayed.

5. Click **OK** and a confirmation message is displayed.

3.4 Product Codes

Product codes are a set of industry recognised reference codes that identify goods or services. Adding product codes to your company profile identifies the goods or services that your company can provide. Adding product codes is not mandatory but it can help the contracting company find your company when they are searching for suitable contractors.

3.4.1 Adding Product Codes

To add product codes:

1. Click the icon in the top-right of the page to open the User menu.
2. Click **Product Codes**.

The Product Codes page is displayed.

3. Click **Add.**

The Add Product Code page is displayed.

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4. Enter values as required for the relevant search criteria.

Option	Description
Code Type	Select a product code type.
Search On	Select whether you want to search by product code or description.
Criteria	Select the appropriate comparison operator.
Search For	The code or description you want to search for. Tip: Enter the % character in the Search For field to perform a wildcard search.

5. Click **Search**.

Product codes matching the search criteria are displayed

6. Use the check boxes to select the product codes you want to add
7. Click **Add.**

A confirmation message is displayed.

3.4.2 Removing Product Codes

To remove a product code:

1. Click the ☰ icon in the top-right of the page to open the User menu.
2. Click **Product Codes**.

The Product Codes page is displayed.

3. Click **Remove** for the product code you want to delete.

A warning message is displayed.

4. Click **OK.**

A confirmation message is displayed

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4 Contracts

The Contracts Manager page provides a dashboard view of all contracts (both current and closed contracts) in which you are involved. The Contracts Management page provides links to the contract homepages of all contracts with which you are associated. From the contract homepage (of open contracts) you can define contract teams, work with contract documents, and communicate with contractors.

4.1 Viewing Contracts

Note: Confidential Access privileges are required to view all contract details.

To view a contract:

1. Click **Contracts** on the Main Menu.

   The Contracts Manager Page is displayed.

2. In the **Open Contracts** section, click the **link** for the contract you want to view.

   The Contract page is displayed.

4.2 Viewing Contract Details

To view contract details:

1. Click **Contracts** on the Main Menu.

   The Contracts Manager Page is displayed.

2. In the **Open Contracts** section, click the link for the contract you want to view.

   The Details tab of the Contract homepage is displayed.

4.3 Contract Risk Covers

ProCon allows you to view risk covers and risk cover certificates associated with a contract.

4.3.1 Viewing Risk Covers

The Risk Covers page allows you to view the following risk covers for a selected contract:

- Retention
- Performance Bond
- Insurance
- Liquidated Damages

To view risk covers:

1. Click **Contracts** on the Main Menu.

   The Contracts Manager Page is displayed.

2. In the **Open Contracts** section, click the **link** for the contract you want to view.

   The Contract page is displayed.

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3. Click the **Risk Covers** tab.

The Risk Covers page is displayed

4.3.2 Previewing Risk Cover Certificates

To preview risk cover certificates:

1. Click **Contracts** on the Main Menu.

The Contracts Manager Page is displayed.

2. In the **Open Contracts** section, click the **link** for the contract you want to view.

The Contract page is displayed.

3. Click the **Risk Covers** tab.

The Risk Covers page is displayed

4. Click the icon for the risk cover whose certificate you want to preview.

   A message is displayed asking you to **open** or **save** the document:

   - Click **Open** to open the certificate in a new window.
   - Click **Save** to save a copy of the certificate to your computer.

4.4 Contract Files

ProCon allows you to add, manage and remove contract files. The file search facility allows you to locate contract files quickly and easily.

4.4.1 Searching for Contract Files

To search for a contract file:

1. Click **Contracts** on the Main Menu.

The Contracts Manager Page is displayed.

2. In the **Open Contracts** section, click the **link** for the contract you want to view.

The Contract page is displayed.

3. Click the **Contract File Search** tab.

The Contract File Search page is displayed.

4. Enter values as required for the relevant search criteria

Option	Description
Search In	Select the location of the files you want to search for: Contract and all Communications, All Communications, Contract Only or by communication template.
Date File Added From	The start date for your search. The end date is by default the current date.
File Added By	Select a user or user group to find contract files added by a particular user or group.

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Search On	Select File Reference or File Name.
Criteria	This option refers to the text you enter in the Search For field. Select whether you want the search to return results which Begins With, Contains or Equals the text you enter in the Search For field.
Search For	Enter search text in the field. Tip: Enter the % character in the Search For field to perform a wildcard search.

Tip: For example, if you want to search for a Contract File where the file name begins with Well, select File Name from the Search On drop-down menu, then select Begins With from the Criteria drop-down menu and enter Well in the Search For field.

5. Click Search.

Contract files matching the search criteria are displayed.

Tip: Click the View Communication icon for a file to view the communication with which the file is associated.

4.4.2 Adding Contract Files

To add a contract file:

1. Click **Contracts** on the Main Menu.

   The Contracts Manager Page is displayed.

2. In the **Open Contracts** section, click the **link** for the contract you want to view.

   The Contract page is displayed.

3. Click the **Contract File Search** tab.

   The Contract File Search page is displayed.

4. Click **Library**.

   The Documents Library page is displayed.

5. Click **Add File.**

   The Add Files page is displayed.

6. Click **Browse** and select the file you want to add.
7. Change the filename using the **Name field** if required.
8. Click **Save.**

The selected file is uploaded to the Documents Library page and a confirmation message is displayed.

Tip: Click Paste File to paste files you have previously saved to the clipboard into the Documents Library page.

4.4.3 Previewing Contract Files

To preview a contract file:

1. Click **Contracts** on the Main Menu.

   The Contracts Manager Page is displayed.

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2. In the **Open Contracts** section, click the **link** for the contract you want to view.

The Contract page is displayed.

3. Click the **Contract File Search** tab.

The Contract File Search page is displayed.

4. Click **Library.**

The Documents Library page is displayed

5. Click the **Name** of the file you want to preview.

   A message is displayed asking you to open or save the document:

   - Click **Open** to open the file in a new browser window.
   - Click **Save** to save a copy to your computer.

4.4.4 Replacing Contract Files

Note: Files attached to communications cannot be replaced

To replace a contract file:

1. Perform a search for the contract file you want to replace.

   See **Searching for Contract Files** for more information on searching for contract files. Contract files matching the search criteria are displayed in the **Contract File Search** page.

2. Click the icon for the file you want to replace.

The File Details page is displayed.

3. From the Actions menu, click **Replace**.

The Replace File page is displayed.

4. Click **Browse** and select the replacement file on your computer.
5. Click **Save.**

The selected file is uploaded to the Contract Library and a confirmation message is displayed.

4.4.5 Renaming Contract Files

Note: Files attached to communications cannot be renamed .

To rename a contract file:

1. Perform a search for the contract file you want to rename.

See **Searching for Contract Files** for more information on searching for contract files. Contract files matching the search criteria are displayed in the **Contract File Search** page.

2. Click the icon for the file you want to replace.

The File Details page is displayed.

3. From the Actions menu, click **Rename.**

The Rename File page is displayed.

4. Enter a new name for the file in the **New Name** field.

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5. Click **Save.**

A confirmation message is displayed.

4.4.6 Making Contract Files Confidential

Note: Files attached to communications cannot be made confidential

To make a contract file confidential:

1. Perform a search for the contract file you want to make confidential.

See **Searching for Contract Files** for more information on searching for contract files

Contract files matching the search criteria are displayed in the **Contract File Search** page.

2. Click the icon for the file you want to make confidential.

The File Details page is displayed.

3. From the Actions menu, click **Make Confidential**.

A confirmation message is displayed.

4. Click **OK**.

A confirmation message is displayed on the File Details page.

4.4.7 Deleting Contract Files

Note: Files attached to communications cannot be deleted.

To delete a contract file:

1. Perform a search for the contract file you want to delete.

See **Searching for Contract Files** for more information on searching for contract files. Contract files matching the search criteria are displayed in the **Contract File Search** page.

2. Click the icon for the file you want to delete.

A warning message is displayed.

3. Click **OK.**

A confirmation message is displayed

4.5 Contract Communications

Communications in ProCon can include general correspondence to and from contractors and the company, technical queries, site instructions, variation requests, applications for payment, and invoices.

4.5.1 Viewing the Communication Register

The Communication Register page displays all available communications for a contract.

To view the communication register:

1. Navigate to the **Contract** page for the contract you want work on.

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See **Viewing Contracts** for more information on navigating to the **Contract** page.

2. Click the **Communications** tab.

The communication register is displayed.

4.5.2 Creating Communications

Communications are created based on communication templates. You can only create communications with the Contractor to Company routing path.

To create a contract communication:

1. Navigate to the **Contract** page for the contract you want work on.

See **Viewing Contracts** for more information on navigating to the **Contract** page.

2. Click the **Communications** tab.

The communication register is displayed

3. Click **Create a Communication** and select the communication template you want to use from the drop-down menu.

Warning: If a communication template has errors, it is listed but cannot be selected. Contact your Santos Contract Analyst.

The Create a Communication page is displayed.

4. Enter information as required in the relevant fields.

Field	Description
Title	The title of the communication.
Description	A description for the communication, e.g. a message to the recipient. Note: This is a Rich Text field; use the buttons on the field toolbar to add formatting to the text.
Communication Owner	The owner of the communication. Set by default according to the communication template. Click the link to see the details of the user.
From	The recipient of the communication. Set by default according to the communication template. Click the link to see the details of the user.
To	The sender of the communication. Set by default according to the communication template. Click the link to see the details of the user.
Communication Preparation Guidelines	The guidelines for creating and sending the communication. Set by default according to the communication template.
Next Steps After Issuing	The guidelines for what should happen once the communication has been sent.

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Originated On	The date on which the communication was created. The default is the current date.

5. Enter values for any custom fields.
6. Financial and schedules values can be added to the communication.
7. In the **Add Financial and Schedules Values** section, select the **Currency** for the communication if the contract has more than one currency. The default currency is the contract base currency.
8. Click the icon.

The **Add Financial and Schedules Values** window is displayed.

9. Enter the values of the fields as required:

Field	Description
Value Type	Select the types of impact: Financial and Schedule. If either of these are set as required in the communication template, the check box will already be selected and cannot be cleared
Title	Enter a name for the impact.
Value	If Financial is selected, enter the value of the financial impact.
Day(s)	If Schedule is selected, enter the number of days of impact on the schedule.

10. Click **OK** to confirm the values.

The financial and schedule values ae displayed on the **Create a Communication** page.

Tip: Click the icon to add more financial and schedule values.

11. You can add a document to the communication.
12. In the **Add Attachment** section, click the icon.
13. Click **Browse** to browse for the document you want to add. Enter a name for the document in the **Name field**.
14. Select whether the document Is **Confidential**.

Tip: Click the icon to add more documents

See **Communication Attachments** for more information about documents added to a communication.

15. The options for saving the new communication depend on its communication template and routing type. Click the appropriate button to create the communication.

Requires Agreement	Click **Save as Draft** to save the communication as *Draft* OR Click **Send** to immediately publish the communication as *Awaiting Response from Recipient*
Does Not Require Agreement	Click **Save** as Draft to save the communication as *Draft* OR Click **Send** to immediately publish the communication as *Approved*

If the communication was saved as **Draft**, the Communication Details page is displayed.

If the communication was published, the **Communications** tab of the **Contract homepage** is displayed.

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4.5.3 Viewing Stories

To view the stories that a communication belongs to:

1. On the communication register, click the icon in the Stories column for the communication to open the **Stories** page.

Alternatively, click the **Title** of the communication to display the **Contract Details** page, then click the **Stories** tab.

The related communications are displayed for each story the communication belongs to. The stories are displayed in order of creation, oldest first.

The following information is displayed for each communication:

+ Title
+ Reference
+ Total financial value (where applicable) o Total schedule value (where applicable) o To (where applicable)
+ From (where applicable)
+ Date Issued
+ Communication State

4.5.4 Communication Revisions

Communication revisions can only be created for communications in the Rejected and Not Agreed states, and only from the latest revision of a communication.

When a communication revision is created, an exact copy of the original communication is generated. The information in a revision can be edited with updated information.

When a revision is created, only the most recent revision of the communication is displayed on the communication register. To view and access previous communication revisions, click the number in the Rev column.

4.5.5 Creating Communication Revisions

Communication revisions can only be created for communications in the Rejected and Not Agreed

To create a communication revision:

1. Navigate to the **Contract** page for the contract you want work on.

See **Viewing Contracts** for more information on navigating to the Contract page.

2. Click the **Communications** tab.

The communication register is displayed.

3. On the communication register, click the **Title** of the communication you want to create a revision of.

The Communication Details page is displayed.

4. Click on the Details tab and select **Create Revision** from the drop-down menu.

The Create a Communication Revision page is displayed.

5. Edit the communication details as necessary.

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6. Click **Save as Draft** and the **Details** page for the new communication revision is displayed

4.5.6 Viewing Communication Revisions

To view a communication's revisions:

1. Navigate to the **Contract** page for the contract you want work on.

   See **Viewing Contracts** for more information on navigating to the **Contract** page.

2. Click the **Communications** tab.

   The communication register is displayed.

3. On the communication register, click the **Title** of the communication you want to view the revisions for.

   The Communication Details page is displayed.

4. Click the **Revisions** tab.

   A list of the communication's revisions is displayed, latest first.

5. Click the **title** of a revision to view its **Communication Details** page.

Alternatively, on the communication register, click the number in the Rev column of the communication you want to view the revisions for. The Revisions tab for the latest version is displayed

4.5.7 Communication Financial and Schedule Values

Certain communication templates such as applications for payment, invoices, variation orders, etc. have associated financial values. Depending on the communication template configuration, the financial value can affect the value of the contract. This can be the value that is committed to the contract, the contract expenditure or the value of risk associated with the contract. When a communication based on these communication templates is approved, the financial value of the communication is added to (or subtracted from) the commitment, expenditure or risk value of the contract.

Communication templates can also contain schedule values. However, these do not affect the contract's end date directly - it must be edited manually by a contract administrator.

If a contract is configured to use more than one currency, it may have communications in each of the configured currencies. However, the financial values of a communication are all in the same currency. Contract financial values are shown in the contract base currency, and are calculated using the configured exchange rates

4.5.8 Adding Financial and Schedule Values

Financial and schedules values can be added when the communication is created (see Creating Communications) or to an existing communication.

To add financial and schedule values to an existing communication:

1. Navigate to the **Contract** page for the contract you want to work on.

   See **Viewing Contracts** for more information on navigating to the **Contract** page.

2. Click the **Communications** tab.

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The communication register is displayed.

3. On the communication register, click the **Title** of the communication you want to edit.

The Communication Details page is displayed.

4. Click the communication state and select **Edit Communication** from the drop-down menu.

The Edit a Communication page is displayed.

5. In the **Add Financial and Schedules Values** section, select the **Currency** for the communication if the contract has more than one currency. The default currency is the contract base currency.
6. Click the icon.

The Add Financial and Schedules Values window is displayed.

7. Enter information as required in the relevant fields.

Field	Description
Value Type	Select the types of impact: Financial and Schedule. If either of these are set as required in the communication template, the check box will already be selected and cannot be cleared
Title	Enter a name for the impact.
Value	If Financial is selected, enter the value of the financial impact.
Day(s)	If Schedule is selected, enter the number of days of impact on the schedule.

8. Click **OK** to confirm the values.

The financial and schedule values are displayed on the Edit a Communication page.

Click the icon to add more financial and schedule values.

4.5.9 Deleting Financial and Schedule Values

Financial and schedules values can only be deleted from a communication in *Draft* state.

To delete financial and schedule values from a communication:

1. Navigate to the Contract page for the contract you want to work on.

See **Viewing Contracts** for more information on navigating to the **Contract** page.

2. Click the **Communications** tab.

The communication register is displayed.

3. On the communication register, click the **Title** of the communication you want to edit.

The Communication Details page is displayed.

4. Click the communication state and select **Edit Communication** from the drop-down menu.

The Edit a Communication page is displayed.

5. In the **Add Financial and Schedules Values** section, click the icon for the value you want to delete.

A warning message is displayed.

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6. Click **OK**.

A confirmation message is displayed.

4.5.10 Communication Attachments

You can add and manage documents attached to communications in ProCon.

4.5.11 Viewing a Communication's Attachments

To view a communication's attachments:

1. Navigate to the **Contract** page for the contract you want to work on.

See Viewing Contracts for more information on navigating to the **Contract** page.

2. Click the **Communications** tab.

The communication register is displayed.

3. On the communication register, click the **Title** of the communication you want to view the attachments for.

The Communication Details page is displayed.

A list of documents attached to the communication is displayed in the **Attachments** section.

4.5.12 Adding Communication Attachments

Documents can be attached when the communication is created - see Creating Communications.

To attach a document to an existing communication:

1. Navigate to the **Contract** page for the contract you want to work on.

See Viewing Contracts for more information on navigating to the **Contract** page

2. Click the **Communications** tab.

The communication register is displayed.

3. On the communication register, click the **Title** of the communication you want to edit.

The Communication Details page is displayed.

4. Click the communication state and select **Edit Communication** from the drop-down menu.

The Edit a Communication page is displayed.

5. Click the **Attachments** section to display a list of documents attached to the communication.
6. Click the icon. The Add File page is displayed.
7. Click **Browse** to browse for the document you want to add.
8. Enter a name for the document in the **Name** field.
9. Select whether the document **Is Confidential**.
10. Click **Save**.

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The Communication Details page is displayed, with the new document displayed in the Attachments section.

Tip: Click the Paste icon to paste files you have previously copied.

Note: You can also upload files by dragging and dropping a file onto the Attachments section of the page.

4.5.13 Editing Communication Attachments

To edit a communication attachment:

1. Navigate to the **Contract** page for the contract you want to work on.

See Viewing Contracts for more information on navigating to the Contract page.

2. Click the **Communications** tab.

The communication register is displayed.

3. On the communication register, click the **Title** of the communication you want to edit the attachment for.

The Communication Details page is displayed.

A list of documents attached to the communication is displayed in the **Attachments** section.

4. Click the icon for a document to display its details.

The Attachment Details window is displayed.

5. Click the **Change Properties** button.

The Update File page is displayed.

6. Edit the document properties as required and click **Save.**

The Communication Details page is displayed.

4.5.14 Deleting Communication Attachments

To delete a communication attachment:

1. Navigate to the **Contract** page for the contract you want to work on.

See Viewing Contracts for more information on navigating to the **Contract** page.

2. Click the **Communications** tab.

The communication register is displayed.

3. On the communication register, click the **Title** of the communication you want to edit.

The Communication Details page is displayed.

A list of documents attached to the communication is displayed in the **Attachments** section.

4. Click the icon for a document to display its details.

The Attachment Details window is displayed.

5. Click the **Delete** button.

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5 Troubleshooting

This section helps users to troubleshoot problems commonly incurred by ProCon users.

5.1 File Download Problems

Problem

You have tried to download a file that you have permission to view but the file does not appear.

Cause

There are generally three causes of file download problems in ProCon:

- File downloads are blocked by a pop-up blocker or your internet security settings.
- The file has downloaded to an temporary internet folder.
- There are PDF and internet browser integration issues in Windows XP.

Solutions

Disable pop-up blockers for ProCon web site

In order to download files from the ProCon web site you will need to configure any pop-up window blockers to allow pop-up windows from ProCon. There may be pop-up blockers running on a number of your applications including third party internet explorer toolbars, AntiVirus applications and Internet Explorer.

Toolbars from Google, Yahoo etc often have custom pop-up blocking features that operate even if the toolbar is not visible. Please check all of your installed toolbars to ensure that they are not blocking pop-up windows from the ProCon website.

Third Party AntiVirus Applications applications from vendors such as Norton, AVG often include pop- up blocking features. Please check your AntiVirus application to ensure that it is not blocking pop-up windows from the ProCon website.

To allow Pop-ups from Internet Explorer:

1. Click **Tools** then select Pop-up Blocker from the drop-down menu.
2. Select **Pop-up Blocker** settings from the sub-menu to display the Pop-up Blocker Settings Window.
3. Enter the **ProCon web address** in the **Address of website** to allow field.
4. Click **Add.**

   The website is displayed in the Allowed Sites text box.
5. Click **Close**.

Enable file downloads from Internet Explorer

To download files from ProCon it is recommended that you enable file downloads and download prompting for Internet Explorer.

1. Click **Tools** on the Internet Explorer menu then select **Internet Options** from the drop-down menu.

   The Internet Options window is displayed.

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2. Click the **Security** tab to display the security settings pane.
3. Select the **Zone** containing your **ProCon website**. (This is Internet unless you explicitly add your ProCon website to your Trusted Sites zone. Adding ProCon to your Trusted Sites zone is also recommended.)
4. Click **Custom** Level.

The Security Settings window is displayed.

5. Scroll down to the **Downloads** section and ensure that:
    - Automatic prompting for file downloads is set to **Enable.**
    - File download is set to **Enable**.
6. Click **OK** to close the Security Settings window.
7. Click **OK** to close the Internet Options window and apply your settings.

Enable confirmation of file opening after download

On the Windows XP operating system, files downloaded from the internet may be automatically sent to a temporary internet folder. This often causes users to think that the file has not downloaded. In this instance the following message is displayed:

The requested file has been downloaded successfully.

However, no prompt to open or save the file is displayed.

To ensure that you are prompted to store the file, please follow these steps:

1. **Right-click** the **Start menu** then select **Explore**.

The Start Menu Window is displayed.

2. Select **Tools** from the Main Menu then **Folder Options** from the drop-down menu.

The Folder Options window is displayed.

3. Click the **File Types** tab.

A list of all registered file types is displayed.

4. Use the scroll menu to locate the type of file you are trying to download.
5. Highlight the required file type, e.g. **DOCX Microsoft Word Document**.
6. Click **Advanced.**

The Edit File Type Window is displayed.

7. Select the **Confirm open after download** check box.
8. Click **OK**.
9. Click **Close** to close the Folder Options window and apply the settings.

Accessing files that have been downloaded to a temporary folder

The files that you download from ProCon are stored in your %temp% folder. To see the contents of this folder follow these steps:

1. **Right-click** the **Start menu** then select **Explore.**

The Start Menu Window is displayed.

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2. Enter **%temp%** in the Address field then press the Return key on your keyboard.

A folder such as *C:\Documents and Settings\user\Local Settings\Temp* is displayed.

3. Sort the contents of this folder by **Date Modified** to find recently added documents.
4. Double-click the required **document** to open.

File download issues with PDF Files

Sometimes when a user downloads a PDF file from the ProCon website, a blank window appears instead of the PDF file. This can occur due to the combination of operating system, Internet Explorer browser and Adobe Reader version in use.

To resolve this issue you should either upgrade to the latest version of Adobe Reader, OR configure

Adobe Reader to prompt the user to save the file to disk as follows:

1. Open the **Adobe Acrobat** or **Adobe Reader** application.
2. Select **Edit** from the **Main menu** and **Preferences** from the drop-down menu.
3. Select **Internet** from the side panel to display the Web Browser Options.
4. Deselect the **Display PDF in Browser** check box.
5. Click **OK.**
6. Close the **Adobe Acrobat** or **Adobe Reader** application.

5.2 File Editing Problems

Problem

You are working with files and the following error message is displayed:

> *Installation of 8over8 control failed. Document edit and generation functionality will not be available.*

Cause

File editing functionality in ProCon is supplied by an 8over8 ActiveX control. If the wrong version of the ActiveX control is installed on your machine, you may be unable to edit files. Copying and pasting files, and the drag and drop functionality are controlled by this ActiveX control and cannot be utilised without the correct version of the ActiveX.

Solutions

Configuring ProCon to allow the 8over8 ActiveX control

Make sure that you have configured ProCon to allow the ActiveX control.

To configure ProCon to allow the ActiveX control on your computer:

1. Log on to **ProCon**.
2. Click the ☰ icon in the top-right of the page to open the User menu.
3. Click **Change User Preferences**.

The User Preferences page is displayed.

4. Select **Yes** from the drop-down menu in the **Allow ActiveX Document Control Support** field.

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5. Click **Save**.

A confirmation message is displayed.

Uninstalling older versions of the 8over8 ActiveX

The simplest solution for file editing problems is to uninstall the 8over8 Active X control. The next time you log on to ProCon and try to edit a file, the most recent version of the ActiveX control will automatically install.

To uninstall the 8over8 AcitveX control:

1. On your **Internet Explorer** browser menu click **Tools** then select **Manage Add Ons** from the drop-down menu.

The Manage Add Ons window is displayed.

2. Select **All add-ons** from the Show drop-down menu.
3. Scroll through the listed add-ons until you find the **8over8 Document** Control.
4. Right-click **8over8 Document Control** then select **More Information** from the drop-down menu.

The More Information window is displayed.

5. Click **Remove** then click **Close**.

The 8over8 ActiveX is uninstalled. Close all open browser windows then reopen ProCon. The latest version of the ActiveX control is installed the next time you try to edit drag and drop/copy and paste a document to ProCon.

Note: If the Remove option is unavailable please refer to the instructions below.

Installing the current version of the 8over8 ActiveX

To download the correct version of the ActiveX control:

1. Copy and paste the following link to an internet browser address field.

`http://YOUR SERVER NAME/ProCon/ProCon DocControl 3.2.1.2 Install.exe`

The File Download Security Warning window is displayed.

2. Click **Run** . The Internet Explorer Security Warning window is displayed.
3. Click **Run** . The Self Extracting Archive window is displayed.
4. Click **Extract** . The Self Extracting Archive window is displayed.
5. Click **OK .** A Command Prompt window is displayed.
6. Follow the on-screen instructions. Close down then **restart** your browser window.

The most recent version of the 8over8 ActiveX is installed and any older versions you may have installed is removed.

Note: If you do not have Admin permissions on your computer, pass the URL/s link to the appropriate Desktop team

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